SENIORS' HOUSING REPORT
Atlantic

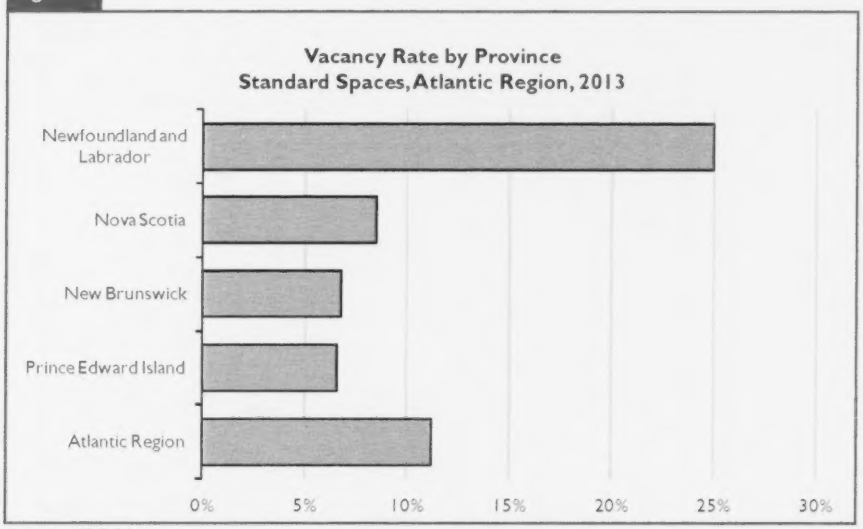
CANADA MORTGAGE AND HOUSING CORPORATION

Date Released: 2013

Highlights

- The overall vacancy rate for standard spaces[1] in the Atlantic Region was 11.2 per cent in 2013 compared to 14.3 per cent in 2012.
- Vacancy rates were lowest in Prince Edward Island at 6.6 per cent, followed by New Brunswick at 6.8 per cent and Nova Scotia at 8.5 per cent. The vacancy rate in Newfoundland and Labrador remained higher than the rest of the region at 25 per cent in 2013, due to a higher concentration of non-standard spaces[2] in the surveyed universe.
- The average rent for a standard space in the Atlantic Region was $2,137 per month in 2013 compared to $2,120 in 2012.

Figure 1



Source: CMHC

[1] A standard space is a space that is occupied by a resident who receives a standard level of care of less than 1.5 hours per day.

[2] A non-standard space is defined as a space that provides heavy care, offers respite accommodation or offers below market or subsidized rents.

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Atlantic Vacancy Rate of Standard and Total (Universe) Spaces

Nearly One-Third of Atlantic Standard Spaces in New Brunswick

CMHC's 2013 Senior's Housing Survey included 127 residences housing 5,889 residents in 6,239 spaces. The majority of spaces, over 4,800, were identified as standard spaces. A standard space is a space that is occupied by a resident who receives a standard level of care (as opposed to heavy care) of less than 1.5 hours per day. The remaining 1,430 spaces surveyed were non-standard spaces. A non-standard space is defined as a space that provides heavy care, offers respite (temporary/short term) accommodation or offers below market or subsidized rents.

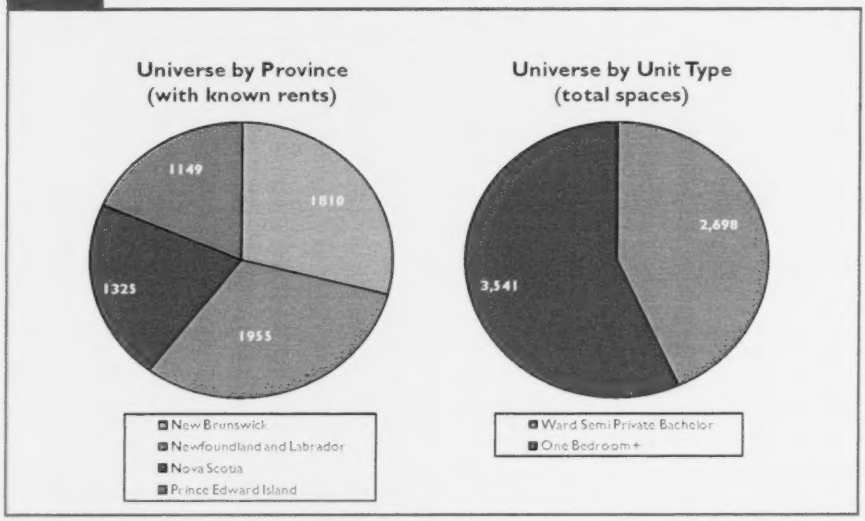
Nearly one-third of standard spaces surveyed in the Atlantic Region were located in New Brunswick. Standard spaces in New Brunswick accounted for 85 per cent of total spaces in the province. The largest universe of non-standard spaces was reported in Newfoundland and Labrador where 46 per cent of spaces surveyed were considered non-standard.

Among standard spaces in the Atlantic Region, one-bedroom plus units were most common at nearly 60 per cent of the total market. Non-standard spaces were more evenly divided with 48 per cent being one-bedroom plus units while the remaining 52 per cent classified as ward, semi-private or bachelor spaces.

Vacancy Rates in Retirement Homes Declined in 2013

CMHC's annual survey of retirement homes in Atlantic Canada found that vacancies for both total and standard spaces declined in 2013.

Figure 2



Source: CMHC

An aging population in the Atlantic Region contributed to stimulating demand for retirement home living and pushed standard space vacancies down to 11.2 per cent this year from 14.3 per cent in 2012. Vacancies declined in three of four provinces with only Nova Scotia reporting an increase in 2013. Rates in Nova Scotia climbed 1.6 percentage points to 8.5 per cent this year.

Standard space vacancies were lowest in Prince Edward Island in 2013 at 6.6 per cent. In 2012, vacancies in PEI stood at 8.2 per cent. The second lowest vacancy rate was reported in New Brunswick where rates declined 0.9 percentage points to 6.8 per cent this year.

In Newfoundland, the vacancy rate for standard spaces declined from 38.7 per cent in 2012 to 25 per cent in 2013. Vacancies remained higher than in the rest of the region as a relatively higher number of total spaces in Newfoundland were non-standard spaces (46 per cent were non-standard). The vast majority of non-standard spaces in Newfoundland receive government subsidies and/or provide additional levels of care. For these reasons, as in 2012, demand was higher for these non-standard spaces. Reduced levels of demand for the remaining (standard) spaces resulted in a relatively high vacancy rate in the province and impacted the overall vacancy rate for the Atlantic Region.

Vacancy rates by unit type were mixed in 2013. In the standard space ward and semi-private segment, a sharp decline in vacancies in Newfoundland and Labrador significantly impacted the regional vacancy rate, resulting in a 19 percentage point decline to 28 per cent. In the bachelor and studio segment, declining vacancies in Nova Scotia and Prince Edward Island were largely offset by a sharp increase in New Brunswick, resulting in little change regionally at 7.9 per cent in 2013.

In the one and two-bedroom plus segments, a significant number of

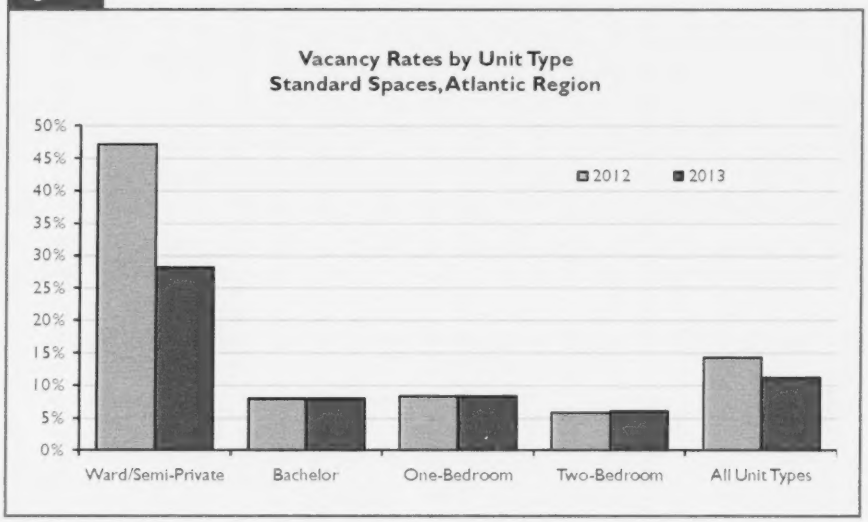
standard spaces in the Atlantic Region were in New Brunswick. As a result, changes to the vacancy rate in New Brunswick have a considerable impact on regional rates. In 2013, increasing one-bedroom vacancy rates in Newfoundland, Nova Scotia and Prince Edward Island were offset by a decline in New Brunswick, leaving the regional vacancy rate unchanged at 8.3 per cent. In the two-bedroom plus market, climbing vacancies in both New Brunswick and Nova Scotia pushed the regional vacancy rate up to six per cent this year.

Standard spaces in the Atlantic Region renting for less than $1,500 per month reported the lowest vacancy rate for the second consecutive year at 4.6 per cent. In the $2,500 plus segment, a sharp decline in vacancies in New Brunswick contributed to regional vacancies declining from 9.5 per cent last year to 7.5 per cent in 2013.

In terms of total spaces (standard plus non-standard), vacancies declined in each province this year with the exception of Nova Scotia. In Newfoundland and Labrador, declining vacancies in Labrador, the Western Region and the Avalon Region resulted in the provincial vacancy rate falling to 14.9 per cent from 17 per cent in 2012. In Prince Edward Island, an overall increase in demand for senior's accommodations resulted in decreasing vacancies in Kings, Prince and Queens counties. The vacancy rate for standard and non-standard spaces in PEI declined nearly two percentage points this year to 5.5 per cent.

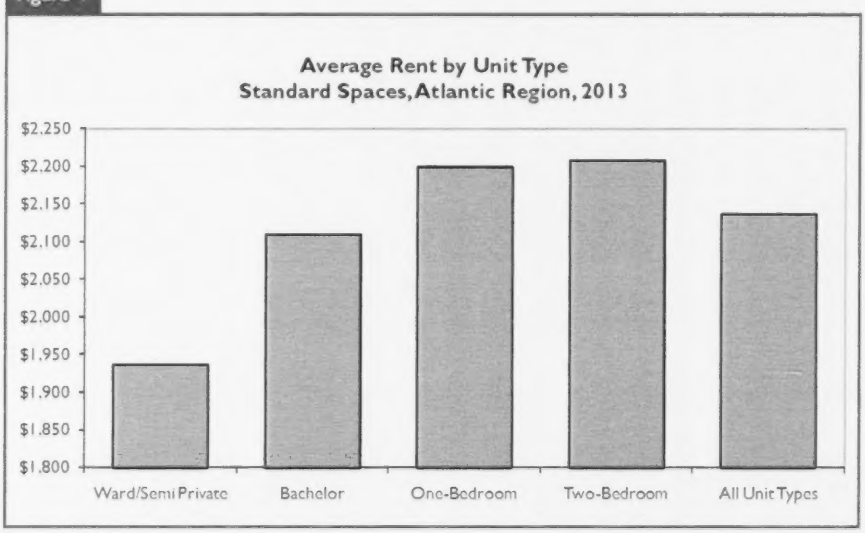
In New Brunswick, three-quarters of surveyed spaces were located in the Southwest and Southeast regions where total vacancies declined to 4.3 per cent this year. As a result, the provincial vacancy rate decreased from 7.3 per cent to 6.1 per cent in 2013. In Nova Scotia, a decline in the vacancy rate in Halifax (where 42 per cent of surveyed spaces were located) to 1.6 per cent was more than offset by increasing vacancies in other parts of the province, which pushed the provincial vacancy rate for all spaces up 1.3 percentage points to 8.5 per cent.

Figure 3



Source: CMHC

Figure 4



Source: CMHC

Services and Amenities

A number of structures in the 2013 survey included services and amenities in rental fees. These services and amenities, which are generally not included in the purpose built rental market, included meals, on-site medical service, a registered nurse,

a pharmacy and recreational and entertainment activities and facilities.

Three meals per day were included in 84 per cent of structures surveyed in the Atlantic in 2013. In less than three per cent of structures surveyed, residents had the choice whether to participate in the meal plan or not. The remaining 13 per cent of structures included either one or two meals per day in monthly rental fees.

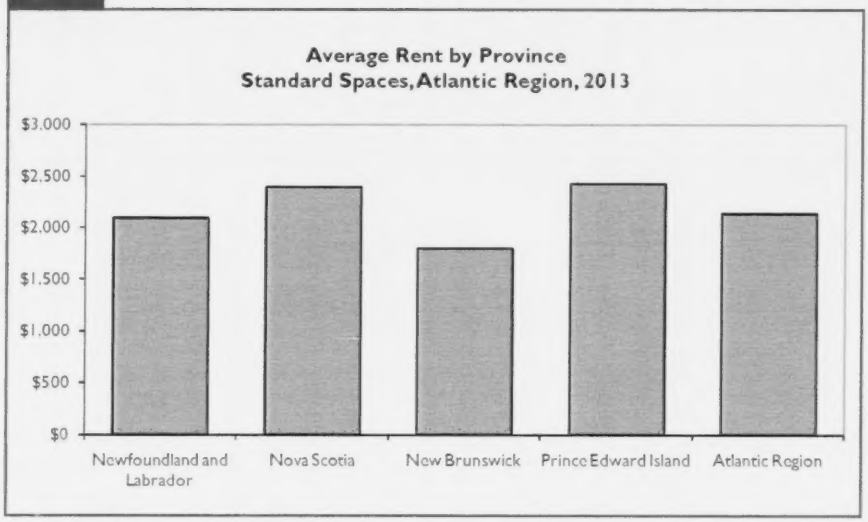
A 24-hour bell service was offered in nearly 83 per cent of regional structures surveyed. The second most common amenity was transportation service, which was available in 75 per cent of structures. Internet access was offered in 56 per cent of structures while on-site medical care was available in nearly 46 per cent of surveyed structures in 2013. A registered nurse was available in 28 per cent of structures surveyed this year.

Little Change in Average Rents in 2013

The average rent for a standard space in the Atlantic Region was $2,137 in 2013 compared to $2,120 in 2012. At the provincial level, rents were mixed as Newfoundland and Labrador and Nova Scotia reported slight increases while Prince Edward Island recorded a small decline. In New Brunswick, the average rent of a standard space reported little change this year at $1,807.

In Nova Scotia, 53 per cent of standard spaces surveyed rented for over $2,500 per month. In Prince Edward Island, the province with the highest average rent in 2013 at $2,433, over 25 per cent of spaces rented for more than $2,500 a month. In New Brunswick, the province with the lowest average rent this year, half of all standard spaces were priced at $1,500 or less.

Figure 5



Source: CMHC

The most expensive unit types in the 2013 survey were one-bedroom and two-bedroom plus units at $2,200 and $2,208, respectively. One-bedroom units were most expensive in Prince Edward Island at over $2,900 per month.

TABLES INCLUDED IN THE ATLANTIC REGION SENIORS' HOUSING REPORT

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1.1 Vacancy Rates (%) of Standard Spaces by Unit Type
Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom		Total	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Newfoundland and Labrador	76.9	37.3	**	**	10.1	13.0	**	**	38.7	25.0
Prince Edward Island	11.6	11.4	7.6	4.8	2.9	4.3	**	**	8.2	6.6
Nova Scotia	7.7	**	7.8	7.5	7.8	9.5	3.4	5.5	6.9	8.5
New Brunswick	**	**	8.7	14.0	8.2	5.4	1.9	4.2	7.7	6.8
Atlantic Region	**47.2**	**28.2**	**8.0**	**7.9**	**8.3**	**8.3**	**5.7**	**6.0**	**14.3**	**11.2**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

1.2 Vacancy Rates (%) of Standard Spaces by Rent Range ($)
Atlantic Region

Province	Less than $1,500		$1,500 - $1,999		$2,000 - $2,499		$2,500 and more		Total where rents are known	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Newfoundland and Labrador	**	**	57.8	35.5	1.1	5.3	5.5	5.7	37.5	25.0
Prince Edward Island	**	**	10.7	14.1	5.0	6.6	7.8	3.4	8.2	8.5
Nova Scotia	3.3	5.0	6.3	9.5	10.8	8.5	7.4	9.5	6.9	8.5
New Brunswick	4.3	4.5	**	**	8.6	12.0	12.7	6.7	7.9	6.5
Atlantic Region	**4.7**	**4.6**	**32.6**	**26.1**	**5.8**	**8.2**	**9.5**	**7.5**	**13.9**	**11.6**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care). Second person extra charge is also excluded from the calculation.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

1.4 Universe, Number of Residents Living in Universe and Capture Rate (%)
Atlantic Region

Province	Total Number of Spaces	Overall Vacancy Rate		Number of Residences	Number of Residents	Estimated Population Aged 75+[1]	Capture Rate[2] (%)
		2012	2013				
Newfoundland and Labrador	1,955	17.0	14.9	37	1,675	34,700	4.8
Avalon Region	759	16.3	14.5	13	654	. . .	. . .
Central & Eastern Region	667	17.1	17.4	14	551	. . .	. . .
Labrador & Western Region	529	17.9	12.5	10	470	. . .	. . .
Prince Edward Island	1,149	7.4	5.5	27	1,099	10,700	10.3
Kings & Prince County	484	8.8	6.4	12	460	. . .	. . .
Queens	665	6.3	4.8	15	639	. . .	. . .
Nova Scotia	1,325	7.2	8.5	33	1,338	71,800	1.9
Halifax	555	3.2	1.6	8	581	. . .	. . .
Northern NS & Cape Breton	265	9.6	16.2	7	235	. . .	. . .
Southern NS & Annapolis Valley	505	10.4	12.1	18	522	. . .	. . .
New Brunswick	1,810	7.3	6.1	30	1,777	57,600	3.1
Northwest, Northeast & Central Region	431	12.6	11.8	11	393	. . .	. . .
Southwest & Southeast Region	1,379	5.3	4.3	19	1,384	. . .	. . .
Atlantic Region	**6,239**	**10.7**	**9.3**	**127**	**5,889**	**174,800**	**3.4**

[1] Source: Statistics Canada, Population Projections for Canada, Provinces and Territories, 2009-2036, Scenario 3.

[2] The capture rate is the proportion of the population aged 75 and over living in the survey universe.

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** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

2.1 Universe of Total Spaces by Unit Type
Atlantic Region

Province	Ward/Semi Private/Bachelor	One Bedroom +	Total
Newfoundland and Labrador	1,021	934	1,955
Prince Edward Island	1,019	130	1,149
Nova Scotia	361	964	1,325
New Brunswick	297	1,513	1,810
Atlantic Region	**2,698**	**3,541**	**6,239**

2.2 Universe by Unit Type
Atlantic Region

Province	Ward/Semi Private/Bachelor	One Bedroom and Two Bedroom +	Total
Newfoundland and Labrador	1,021	934	1,955
Standard Spaces	502	552	1,054
Non-Standard Spaces	519	382	901
Prince Edward Island	1,019	130	1,149
Standard Spaces	**	**	**
Non-Standard Spaces	**	**	**
Nova Scotia	361	964	1,325
Standard Spaces	361	**	**
Non-Standard Spaces	-	**	**
New Brunswick	297	1,513	1,810
Standard Spaces	**	**	1,540
Non-Standard Spaces	**	**	270
Atlantic Region	**2,698**	**3,541**	**6,239**
Standard Spaces	1,957	2,852	4,809
Non-Standard Spaces	741	689	1,430

2.3 Universe of Standard Spaces and Rent Range ($)
Atlantic Region

Province	Less than $1,500	$1,500 - $1,999	$2,000 - $2,499	$2,500 +
	% of Total[1]	% of Total[1]	% of Total[1]	% of Total[1]
Newfoundland and Labrador	**	65.3	23.1	11.6
Prince Edward Island	2.6	39.0	32.7	25.7
Nova Scotia	18.3	14.3	14.2	53.2
New Brunswick	50.5	0.2	16.9	32.4
Atlantic Region	**22.4**	**25.0**	**19.9**	**32.6**

[1] % is based on those spaces where the rent is known

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

2.4 Proportion (%) of Structures where Select Services are Available[1] by Structure Size Atlantic Region

Province	Meals				On-Site Medical Services	Registered Nurse onsite[2]	24-hour call bell	Pharmacy
	Optional	# included in rent						
		1	2	3				
Newfoundland and Labrador	0.0	0.0	0.0	100.0	2.7 a	5.4 a	59.5	0.0
10 - 49	0.0	0.0	0.0	100.0	0.0 a	6.3 a	37.5	0.0
50 - 89	0.0	0.0	0.0	100.0	5.9 a	5.9 a	76.5	0.0
90 or more	0.0	0.0	0.0	100.0	0.0 a	0.0 a	75.0	0.0
Prince Edward island	0.0	0.0	0.0	100.0	85.2 a	48.1 a	96.3	0.0
10 - 49	0.0	0.0	0.0	100.0	94.4 a	27.8 a	94.4	0.0
50 - 89	0.0	0.0	0.0	100.0	57.1 a	100.0 a	100.0	0.0
90 or more	**	**	**	**	**	**	**	**
Nova Scotia	3.0	18.2	21.2	57.6	63.6 a	36.4 a	84.8	12.1
10 - 49	0.0	13.6	9.1	77.3	59.1 a	27.3 a	81.8	9.1
50 - 89	**	**	**	**	**	**	**	**
90 or more	16.7	33.3	33.3	16.7	66.7 a	33.3 a	83.3	33.3
New Brunswick	6.7	6.7	6.7	80.0	43.3 a	30.0 a	96.7	20.0
10 - 49	0.0	0.0	5.6	94.4	33.3 a	16.7 a	100.0	5.6
50 - 89	33.3	16.7	0.0	50.0	50.0 a	50.0 a	83.3	33.3
90 or more	0.0	16.7	16.7	66.7	66.7 a	50.0 a	100.0	50.0
Atlantic Region	**2.4**	**6.3**	**7.1**	**84.3**	**45.7 a**	**28.3 a**	**82.7**	**7.9**
10 - 49	0.0	4.1	4.1	91.9	48.6 a	20.3 a	79.7	4.1
50 - 89	5.7	5.7	8.6	80.0	34.3 a	42.9 a	85.7	5.7
90 or more	5.6	16.7	16.7	61.1	55.6 a	33.3 a	88.9	27.8

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

[2] Registered Nurse on site means a RN, not a RPN or LPN.

The following letter codes are used to indicate the reliability of the estimates:

a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

2.5 Proportion (%) of Structures with Access to Selected Amenities[1] by Structure Size Atlantic Region

Province	Transport-ation Services	Swimming Pool	Hot Tub - Spa	Movie Theatre	Exercise Facilities	Internet
Newfoundland and Labrador	81.1	0.0	0.0	0.0	5.4	16.2
10 - 49	81.3	0.0	0.0	0.0	0.0	18.8
50 - 89	76.5	0.0	0.0	0.0	5.9	17.6
90 or more	100.0	0.0	0.0	0.0	25.0	0.0
Prince Edward island	88.9	0.0	0.0	11.1	37.0	63.0
10 - 49	94.4	0.0	0.0	11.1	27.8	44.4
50 - 89	71.4	0.0	0.0	0.0	57.1	100.0
90 or more	**	**	**	**	**	**
Nova Scotia	63.6	0.0	6.1	12.1	42.4	78.8
10 - 49	54.5	0.0	9.1	4.5	22.7	68.2
50 - 89	**	**	**	**	**	**
90 or more	83.3	0.0	0.0	50.0	83.3	100.0
New Brunswick	66.7	6.7	16.7	80.0	66.7	73.3
10 - 49	61.1	0.0	0.0	83.3	50.0	55.6
50 - 89	50.0	16.7	50.0	83.3	100.0	100.0
90 or more	100.0	16.7	33.3	66.7	83.3	100.0
Atlantic Region	**74.8**	**1.6**	**5.5**	**24.4**	**36.2**	**55.9**
10 - 49	71.6	0.0	2.7	24.3	25.7	48.6
50 - 89	71.4	2.9	8.6	14.3	42.9	60.0
90 or more	94.4	5.6	11.1	44.4	66.7	77.8

[1] Services are considered to be included in rent for a structure if the majority of all spaces have the service included in the rent.

The following letter codes are used to indicate the reliability of the estimates:
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** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

3.1 Average Rent ($) of Standard Spaces by Unit Type
Atlantic Region

Province	Ward/Semi-Private		Bachelor		One Bedroom		Two Bedroom		Total	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
Newfoundland and Labrador	1,786	1,800	**	**	2,154	2,376	**	**	2,005	2,098
Prince Edward Island	2,033	2,125	2,608	2,386	2,810	2,936	**	**	2,500	2,433
Nova Scotia	**	**	2,368	2,070	2,579	2,642	1,749	2,080	2,355	2,394
New Brunswick	**	**	2,061	1,814	1,727	1,763	2,089	2,025	1,810	1,807
Atlantic Region	**1,893**	**1,937**	**2,411**	**2,109**	**2,079**	**2,200**	**2,039**	**2,208**	**2,120**	**2,137**

The following units are excluded from the table above: non-market/subsidy units; respite units; and, units where an extra charge is paid for Heavy-care (1½ hours or more of care).

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a – Excellent, b – Very good, c – Good, d – Fair (Use with Caution)

** Suppressed to protect confidentiality ++ Not statistically reliable — No units exist in universe for this category

Methodology

Canada Mortgage and Housing Corporation conducts the Seniors' Housing Survey in February and March. This annual survey became national in scope in 2009, covering all centres in each of the ten provinces. Both private and non-profit residences are included in the survey universe. Non-profit residences must have at least one unit that is not subsidized.

To be eligible for inclusion in the 2013 survey results, a residence must:

- ✓ Have been in operation for at least one year, i.e., before January 2012
- ✓ Have at least 10 rental units (Quebec, Ontario, Prairies) or 5 rental units (Atlantic provinces and B.C.)
- ✓ Offer an on-site meal plan
- ✓ Not provide high levels of healthcare (defined as 1.5 hours or more of care per day) to all of their residents. Nursing homes and long-term care homes are examples of residences that were not included in the survey.
- ✓ Offer rental units. Life lease units and owner-occupied units are excluded from this survey.
- ✓ Have at least 50% of residents who are 65 years of age or older.

The Seniors' Housing Survey is a census and not a sample survey, therefore, all seniors' residences in Canada meeting these criteria are included to be part of this survey.

Survey data were obtained through a combination of telephone interviews and fax and email responses. Information was obtained from the owner, manager, or residence administrator. Survey results reflect market conditions at the time of the survey. Survey results have been weighted to adjust for non-responses, to ensure that they are reflective of the universe. The level of statistical reliability is noted in the data tables. For more information on the reliability of the data please click here.

All statistics published, excluding information on new market supply, include only those residences that have been in operation for at least one year.

Definitions

Space: A space is a residential area that is rented out. Examples of spaces include: one half of a semi-private unit, a private or bachelor unit, a one-bedroom unit and a two-bedroom unit. In most cases a space is the same as a unit. The exception is the case where a unit has been divided to rent to multiple residents. Semi-private and ward units are an example of this. Unless otherwise indicated, data for spaces are for all unit types.

Standard Space: A space where the resident does not receive high-level care (i.e., the resident receives less than 1.5 hours of care per day.) or is not required to pay an extra amount to receive high-level care. Regional terms for this type of space may vary across the country.

Heavy Care Space: A space where the resident is paying an extra amount to receive high-level care (1.5 hours or more of care per day). Examples include Alzheimer, Dementia and mobility support residents.

Respite Space: A space used to provide temporary accommodation for a senior who normally lives in another place and not at the residence.

Non-market or Subsidy Space: A space where the rent received for the unit is less than market rent or where the resident occupying the unit is subsidized.

Rent: Refers to the actual amount a resident pays per month for their accommodation space and all mandatory services. For vacant spaces, the rent is the amount the owner is asking for the space.

Vacancy: A space is considered vacant if, at the time of the survey, it is physically unoccupied and available for immediate rental.

Capture Rate: The main age group living in seniors' residences are persons aged 75 years and older. Capture rate in a centre is the ratio of the total number of residents living in the survey universe divided by its estimated 75+ population, expressed as a percentage.

Acknowledgement
The Seniors' Housing Survey could not have been conducted without the cooperation of the residence owners and their staff. CMHC acknowledges their time and assistance in providing accurate information. As a result of their contribution, CMHC is able to provide data and analysis that benefits the entire industry.

Confidentiality
All information provide through this survey is kept strictly confidential and only used by CMHC to generate statistics and data sets that do not allow for the identification of individuals, households, businesses or buildings.

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